



Filing ID #10020080

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Susan Moran Palmer
Status: Congressional Candidate
State/District: OH16

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 03/30/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Accrued tax account	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
BNDX	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
BNY Mellon Ironwood Registered Funds ⇒ Ironwood institutional Multi-strategy Fund llc		\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: IRA rollover held at Gries financial					
FirstEnergy Corporation (FE)	SP	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Gries Financial 401(k) ⇒ BIICX	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	None
Gries Financial 401(k) ⇒ BILPX	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	None
Gries Financial 401(k) ⇒ FEMKX	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Gries Financial 401(k) ⇒	SP	\$100,001 -	Dividends	\$1,001 - \$2,500	\$1,001 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
FFEXX		\$250,000			\$2,500
Gries Financial 401(k) ⇒ FIREX	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Gries Financial 401(k) ⇒ FMCSX	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Gries Financial 401(k) ⇒ FRESX	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Gries Financial 401(k) ⇒ QLENX	SP	\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500	None
Hungtington Relationship Money Market	JT	\$50,001 - \$100,000	None		
Huntington Checking	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ American Tower Corporation (AMT)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ AmerisourceBergen Corporation (ABC)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ Apache Corporation (APA)	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
JEFFREY H PALMER - IRA BDA ⇒ Archer-Daniels-Midland Company (ADM)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ C.H. Robinson Worldwide, Inc. (CHRW)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ Cabot Oil & Gas Corporation (COG)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ Cardinal Health, Inc. (CAH)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ Cisco Systems, Inc. (CSCO)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
JEFFREY H PALMER - IRA BDA ⇒ Expeditors International of Washington, Inc. (EXPD)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ Exxon Mobil Corporation (XOM)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ FDRXX	SP	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ FedEx Corporation (FDX)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ FLIR Systems, Inc. (FLIR)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ General Mills, Inc. (GIS)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ InterDigital, Inc. (IDCC)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ Kellogg Company (K)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ Lowe's Companies, Inc. (LOW)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ McKesson Corporation (MCK)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ Monro, Inc. (MNRO)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ Occidental Petroleum Corporation (OXY)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ Owens & Minor, Inc. (OMI)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ Public Storage (PSA)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ QUALCOMM Incorporated (QCOM)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
JEFFREY H PALMER - IRA BDA ⇒ Schlumberger N.V. (SLB)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ TJX Companies, Inc. (TJX)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ Tractor Supply Company (TSCO)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ Tyson Foods, Inc. (TSN)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ United Parcel Service, Inc. (UPS)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ Ventas, Inc. (VTR)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER - IRA BDA ⇒ Welltower Inc. (WELL)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER TRUST ⇒ AEIQ	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	None
JEFFREY H PALMER TRUST ⇒ FDRXX	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
JEFFREY H PALMER TRUST ⇒ IEFA	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
JEFFREY H PALMER TRUST ⇒ IEMG	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
JEFFREY H PALMER TRUST ⇒ IJH	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
JEFFREY H PALMER TRUST ⇒ IVV	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
JEFFREY H PALMER TRUST ⇒ NPSRX	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
JEFFREY H PALMER TRUST ⇒	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
QLEIX					
JEFFREY H PALMER TRUST ⇒ SFGIX	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Johnson and Johnson SPD		Undetermined	None		
Medtronic plc. Ordinary Shares (MDT)		\$50,001 - \$100,000	Dividends	None	\$1,001 - \$2,500
DESCRIPTION: 1605.00 in 2017 dividends					
Medtronic Savings and Investment Plan ⇒ Target 2030 Trust Select		\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: mutual fund in 401k/Medtronic					
Medtronic Savings and Investment Plan ⇒ Vanguard international growth		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: mutual fund/Medtronic 401k					
Ohio tuition trust authority College advantage		\$100,001 - \$250,000	Tax-Deferred		
LOCATION: OH					
DESCRIPTION: college savings Jeremy					
Ohio tuition trust authority College advantage	SP	\$50,001 - \$100,000	Tax-Deferred		
LOCATION: OH					
DESCRIPTION: Stephen					
Ohio tuition trust authority College advantage		\$50,001 - \$100,000	Tax-Deferred		
LOCATION: OH					
DESCRIPTION: Robert					
Parma House Account	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Phillips 66 (PSX)	SP	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: Phillips 66 stock					
SCHF	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Sun Ridge Investment Partners	JT	\$50,001 - \$100,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
TFI	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
vti	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

* Asset class details available at the bottom of this form.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Medtronic INC	salary plus commission	\$63,671.00	\$252,266.00
Gries Financial LLC	spouse salary	N/A	N/A
Giant Eagle	dependent child	N/A	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- BNY Mellon Ironwood Registered Funds
- Gries Financial 401(k) (Owner: SP)
- JEFFREY H PALMER - IRA BDA (Owner: SP)
- JEFFREY H PALMER TRUST (Owner: SP)
- Medtronic Savings and Investment Plan

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Susan Moran Palmer , 03/30/2018